Vision & Values

How to make them come alive in your company

A Synergy research study
November 2011
We put 5 burning questions to the comms managers of some of Britain’s biggest multinational companies... here’s the results

Everybody talks about inspiring employees by creating Vision & Values, but what really works? What actually makes a difference? And what are the tips and tricks that deliver value for money?

We’ve completed enlightening research with internal communication managers of large multinational companies to establish what actually works when it comes to establishing, communicating and embedding a company’s vision and values into everyday practice.

The results make valuable reading for anybody tasked with making vision and values come alive within their business.

But what makes this research even more valuable is that it comes from the horse’s mouth: what follows are the views, policies and proven practices of some of the top people responsible for vision and values in some of Britain’s top companies.

Thank you to everyone that took part.
Participants included:

- Leading car manufacturer
- One of the UK’s largest leisure businesses
- World’s largest research-based pharmaceutical company
- World leader in natural gas
- A global research-based biopharmaceutical company
- UKs leading beer and cider business
- Veolia
- Warburtons
- Capital One
- Wellcome Trust
- Highways Agency
- London Overground

Sharing knowledge

We’d like to say a big thank you to those companies that took part. We think you’ll agree that their input has provided valuable insights, ideas and best practice examples of how to embed Vision & Values into your company.
Key learning points

1. Leadership from the top is essential for success
   - Everyone agreed that leadership is key
   - A clear link between your Vision & Values and your strategic plan is essential
   - Refresh and reinforce your strategic plan with annual imperatives

2. Think global, act local
   - Think globally, act locally
   - If the audience is diverse and global, keep your language simple

3. Creativity = effective communication
   - It's important to express your Vision & Values in a creative and memorable way
   - Keep the communications simple and flexible
   - Communicate using a variety of methods

4. Put Vision & Values at the core of all your communications
   - Your Vision & Values must inform your communications as the organisation moves forward
   - Consider every decision within the context of your Vision & Values
   - Keep HR involved at all stages
   - It's important to work as a cross-functional team
   - Make sure your messaging is consistent

5. People and engagement
   - Link your Vision & Values to performance assessments
   - A bottom-up approach creates engagement
   - It's vital to put the appropriate training programmes in place
   - Create champions who will drive home the Vision & Values
   - Every person needs to know how they can contribute
   - Regularly check employees’ understanding of Vision & Values, and subsequent action plans
   - A programme of regular re-engagement is a good idea
Everyone agreed that leadership is key
Leaders at every level in the organisation, need to be on-board. Line manager involvement and buy-in are the key ingredients to success, and essential if Vision & Values are to be communicated effectively to employees.

"Comms all start with our CEO and their direct reports. Then directors come together to review the current year’s performance. They work as a group to identify where the business is going."

Capital One

Advice we would recommend:
1) Senior team buy-in, support and belief. 2) Credible values that the company feels resonate with them. 3) Time to explore what they mean properly.

We have leadership communications and face-to-face meetings with line managers. For technical staff, we rely on line managers and the challenge is to try and maintain consistency.

Warburtons

We launched it on the back of the strategic plan. We don’t have a specific set of employee values but more values that relate back to our brand.

Wellcome Trust

The vision has to be stretching, challenging and exciting for people and they MUST know how they contribute. They have to be able to discuss what it means to them and how they’ll play their part in achieving it.

Wellcome Trust

A clear link between your Vision & Values and your strategic plan is essential
It really helps when everyone understands how the strategic plan will allow the organisation to achieve its vision and live up to its values. Equally important, employees need to understand that what they do as an individual, in their particular role, contributes to that plan.

"The vision has to be stretching, challenging and exciting for people and they MUST know how they contribute. They have to be able to discuss what it means to them and how they’ll play their part in achieving it."

Warburtons

We face the challenge of helping people to understand this isn’t an add-on – it’s part of your day-to-day job – focusing on the vision and aligning to it. It’s not a project. It’s part of our DNA.

Warburtons

Capital One
1. Leadership from the top is essential for success

Refresh and reinforce your strategic plan with annual imperatives

Your high level strategic plan can be re-energised with yearly imperatives. What’s needed this year or this quarter? This helps everyone with their short-term focus. Breaking down the vision and strategic plan into annual goals gives employees a clear set of priorities for the next 12 months that they can really relate to.

“We have yearly imperatives – one year plan of what we’re focusing on. We spend a lot of time communicating and discussing our one year imperatives.”

Capital One

2. Think global, act local

Think globally, act locally

When you conduct global roll-outs, ensure you make your plans country specific. You can have global values, but you need to understand how they operate and translate in different regions and within different cultures. Think globally, then by country, team and individual – people need to see the links. Individuals can use the Vision & Values to build their approaches, plans and guiding principles in their local environment.

“Europe sets ‘the one strategy’. Everyone understands this and it’s rolled out locally. Employees go on a one-day programme - looking at international strategy then local strategy. Workshops help people make connections to their local environments. They have 10 local values and we look at one value per month.”

“Centrally we have a set of values that the company adopts on a global scale, with each of the seven business units that comprise our business having their own sets of values and particular behaviours that help distinguish them and echo the type of work they undertake.”

“The size and reach of our organisation is a challenge…getting to 94 different countries. Make things local…the more localised and personal the better – give top level information and countries can adapt to them personally. This generates better understanding.”
Key learning points
2. Think global, act local

If the audience is diverse and global, keep it simple

If your employees are scattered across a wide variety of jobs and many different countries, from a variety of cultures, keep the messaging simple, and translate it into the local language.

“Biggest challenge is the link between global strategy and local strategy and making it sound simple. It’s a wide communication with lots of parts - simplifying the messages and themes are the key challenge.”

“What really worked was translation of materials to local language. It’s also essential to test messages culturally.”

“We have a diverse audience so we must keep things simple.”

3. Creativity = effective communication

It’s important to express your Vision & Values in a creative and memorable way

It’s essential that your creative approach brings your Vision & Values alive, has impact, is memorable and noticed, otherwise the messages won’t stick.

“It’s important to find the right vehicle, make it memorable to get it out there. We held a staff street fare where we looked at the ‘extraordinary’ and told different stories. It felt right.”

Wellcome Trust

“An agency brings fresh thinking... must be memorable.”

“For creative, we used agencies, which was essential. We looked after the values and our etiquette, however the agency helped us with positioning, markets, what it would look like and icons. They have better flare.”

“Biggest challenge is the link between global strategy and local strategy and making it sound simple. It’s a wide communication with lots of parts - simplifying the messages and themes are the key challenge.”

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“We have a diverse audience so we must keep things simple.”
Key learning points

3. Creativity = effective communication

Keep the communications simple and flexible

The Vision and Values must be communicated clearly and simply for everyone throughout the organisation to understand them. A global or national strategy needs to be adapted to ensure it’s adopted at a local level. Workshops and team meetings can help employees make connections between the broad strategy and local plans and actions.

“We have a diverse audience so make sure messages are clear and simple. Make sure those you’re communicating with understand what they are.”

“Two-way dialogue, discussion and engagement to build understanding.”

Communicate using a variety of methods to engage employees

Different people absorb information in different ways, so it pays to use a variety of different approaches. A mix of media - offline and online works best.

“We have 1,000 employees – people want communications in different ways – experiential, interactive, team meetings, we offer the full scope. Website has lots of activities. We focus on variety, styles, continuity and evidence.”

“Values are talked about extensively. We have posters around all sites. Vision and values shine through in our quarterly magazine and this has constant referral back to them. We reiterate them in all communications and other business publications include them.”

“Not everyone has a desktop PC so we’ll be doing lots of face-to-face communications and we’ll need to be creative in how we reach this audience.”

Capital One
4. Put V&V at the core of all your communications

Key learning points

Your Vision & Values must inform all your communications as the organisation moves forward

All future communications must be framed within the vision and values statements. Every initiative, every communication or organisational change must be seen as an opportunity to reinforce the key messages - everyone needs regular reminders.

“In the future everything we do, every initiative, every reward communication, every time we launch a product – it needs to be framed in its context of the vision and values.”

Consider every decision within the context of your Vision & Values

Use your vision and values as a framework for making business decisions. For example, when looking at a particular issue and making a decision, remember to ask “Is this course of action consistent with our vision and values?”

“Staff use these as tools - a guide or a framework for when they’re doing something. If we’re thinking about doing something new, we’ll say if we want to be “bold” would we consider this? It helps us determine whether we should investigate it.”

“Your Vision & Values must inform all your communications as the organisation moves forward. All future communications must be framed within the vision and values statements. Every initiative, every communication or organisational change must be seen as an opportunity to reinforce the key messages - everyone needs regular reminders.”

“Warburtons”

“The vision gets talked about a lot because it was new, stretching and exciting. We talk about it in all leadership comms and link all activity with how it helps us achieve our vision.”

“London Overground”

“Our vision and aim – we live based on this. It’s quite pragmatic. We do act on our values as this is what we’re operating against all the time.”

“Staff use these as tools - a guide or a framework for when they’re doing something. If we’re thinking about doing something new, we’ll say if we want to be “bold” would we consider this? It helps us determine whether we should investigate it.”

“Wellcome Trust”
4. Put V&V at the core of all your communications

**Key learning points**

**Keep HR involved at all stages**

If you want to ensure the link between vision and values, reward, recognition and performance, you must work with HR throughout. By doing this, the vision and values can act as a framework for the employee’s journey with the company from induction, direction, performance, reward and growth.

“Major HR involvement is needed to ensure the link between Vision and Values, rewards and performance.”

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**It’s important to work as a cross-functional team**

Whenever you’re looking at your vision and values it’s a good idea to involve a variety of people from within the business. This group should represent a range of functions and departments: for example, marketing, HR, operations and internal communications. This helps to ensure that messages resonate with all employees, and that you achieve a broad consensus.

“We break down silos by linking up HR, marketing and internal comms. Working as a team makes a real difference. For the brand, a group gets together every 3 months to look at: How are we sharing this across the company? Does it all still make sense? Comms, HR, reps from all business functions discuss this together.”

Wellcome Trust

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“You have to talk to a cross-section of people and find out what the values really are and they have to be true. If they’re not then you haven’t got a chance in making sure they’re lived.”

Warburtons
4. Put V&V at the core of all your communications

Key learning points

Make sure your messaging is consistent
If you are communicating with employees regularly, using a number of different approaches, it’s important to check the consistency of your message.

“It’s more challenging to communicate with operational staff than office staff. They say they want to be communicated with but don’t always engage. However, we ensure the same messages are in their comms for consistency.”

Link your Vision & Values to your performance assessments
Make employees accountable. It’s vital to let individual employees know that the degree to which they adopt the company’s vision and values - and demonstrate this in their work every day - is going to be monitored and measured.

“Values are part of our performance management programme. People are measured against it – this is all documented in their performance management programmes.”

“One trick that’s key... relate it directly to performance assessments. What makes it a real success is that employees are assessed on how they are perceived against the values. We added a behavioural framework and involved staff in discussion through the team briefing process.”

Highways Agency

“We’re launching a recognition programme based on our values to encourage and reward the right behaviours. Monthly winners will have the chance to be quarterly winners. Quarterly winners will be invited to an annual awards dinner. This will reinforce the values, keep them front of mind and ensure they’re lived.”
5. People and engagement

Key learning points

A bottom-up approach creates engagement

It’s important to define your values from the bottom-up, so that employees feel a sense of ownership from the outset. This ‘bottom-up’ approach includes direct research or consultation with employees as a way of growing these values. Workshops, focus groups, surveys and interviews all play their part in creating employee ownership and sustaining their involvement.

“We’ve done this the right way. We have defined our values from the bottom-up, which is the result of 1,000 conversations across the business. It feels genuine, senior leaders find it easy to feel a degree of ownership of values.”

“'It’s important vision and values programmes are not owned by HR/comms – they need to be owned by the people in the business and develop their own momentum. It will move faster in some businesses than others.”

Warburtons

It’s vital to put the appropriate training programmes in place

Helping line managers communicate consistently and clearly is essential. Training is required to give them the tools and confidence to have that dialogue.

“Mandatory training, induction and re-induction – that’s essential.”
5. People and engagement

Key learning points

Create champions who will drive home the Vision & Values

Messages will be communicated more effectively, and adopted more rapidly, if you have champions in every area of the business to articulate the key points enthusiastically.

“Ideally, look for champions within the business to drive the messaging from the top down.”
Veolia Water

“A Champions network across all business areas is essential.”

Every person needs to know how they can contribute

You should provide outlets that make it easy for people to discuss what the vision and values mean to them and how they can play their part.

“Face-to-face immersion sessions – this will take us beyond engagement to real involvement. If you involve people in action, it’s more powerful.”

“People must know how they can contribute. They have to be able to discuss what it means to them and how they’ll play their part in achieving it.”
Warburtons

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Warburtons
5. People and engagement

Key learning points

Regularly check employees’ understanding of Vision & Values, and subsequent plans

Focus groups, annual surveys, snapshot opinion polls and forums let you know the level of understanding across the organisation. Questions such as “Is this vision right for us?” and “Do you know how you can contribute to our vision?” work well for companies. Corrective actions can be put in place after employee surveys.

“Staff commitment is measured on an annual basis through an all employee survey. The survey has a high response rate (88% of 61,000 employees) and corrective actions are taken where required in response.”

“Once a year we have a colleague opinion survey and questions allude to vision and values – the figures can then see if they’re working.”

“We have recently conducted a staff survey (which we plan to do annually) – this consisted of several questions around vision and values to check employee’s awareness.”

Veolia Water

A programme of regular re-engagement is a good idea

Running regular engagement programmes throughout the year helps to keep the vision and values fresh. These are more effective than one-off initiatives.

“We do intermittent programmes of engagement and this is something we’ll look at again this year. As a reminder we have a values wall and screen savers.”

Capital One

“You need to keep it energised, front of mind and ensure people are living them. And reward them when they do.”

Warburtons
Implementation ideas and communication tools

Implementation ideas - mix it up
The companies we spoke to used a variety of media. We’ve highlighted some of their implementation ideas here.

Visual impact and creativity
To bring communications alive, companies mentioned catchphrases, icons and graphics to simplify messages.

Staff conferences
Great face-to-face opportunities, including workshops/focus groups, but quite resource intensive.

Case studies and stories
Really bring communications alive and help people relate to messages in their daily roles.

Video
Very visual and offers more emotion.

Broadcast media
Such as ipadio - you record a message and people dial in and listen to the message and vote on it. Oxfam and Virgin Media use this.

Events
Great for lots of employees based in one location – one company interviewed held a staff street fair, with stalls from different departments and teams.
Implementation ideas and comms tools

Implementation ideas

Regular focus
One value per month, this is easier for employees to take in - gives focus and allows employees to digest and put into practice.

Tie in with major global events
This can be fun to do - for instance, lots of companies are using sports references next year.

Experiential marketing
Helps embed and go beyond engagement to create real involvement and experience.

Values wall
A really impactful visual reminder.

Screensavers
A regular reminder of your campaign.

Magazines
Magazines have an important role to play, the more lifestyle oriented they are, the better.

Posters
Work well for dispersed sites.

Round-table discussions
Great for getting dialogue going.

‘Ask the CEO’ sessions
Great for frank answers from the top.

Social media discussions
Discussions, forums and idea exchange sessions can work well online.

Translation to local languages
Local introduction from country managers was important for two companies.

Annual integrated campaigns
Rather than one-off.

Colleague survey
360° feedback based on vision and values.

Choosing the right media

Team meetings
Why is it good?
- Can boost team morale
- Personal and relevant to the team
- Encourages two-way dialogue

Things to consider
- Needs a good facilitator
- Takes time and resource
- People can’t take too much in, in one go
- Repeat important info in print

Intranet
Why is it good?
- One central resource
- Easy and fast to update
- Creative with animation, video, music
- Measure visits through web stats

Things to consider
- Do all employees have access?
- Drive employees to the site
- Keep content fresh and updated

Magazine (print or online)
Why is it good?
- Reaches all employees and is portable
- Staff can contribute content
- Reinforces values and core messages
- Design can reflect your business culture

Things to consider
- Need to strike right content balance
- Information can date quickly
- Must be relevant to all employees
- Doesn’t allow discussion/questions
**Video/broadcast**

**Why is it good?**
- Very visual
- More emotional
- Music and movement adds interest
- More personal than print

**Things to consider**
- Up-front investment
- How will all staff view or listen to it?
- System download capabilities

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**Social media**

**Why is it good?**
- Wide reach and conversational
- More personal than print
- More engaging
- Encourage collaboration (forums/blogs)

**Things to consider**
- Takes time, commitment and resource
- Content must be interesting and useful
- Blogging: who is the best person?
- Good/bad feedback is seen by all

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**Email**

**Why is it good?**
- Cost effective, wide distribution
- Can measure click-throughs
- Good for information, awareness and calls-to-action (link to intranet)

**Things to consider**
- Do all employees have email/intranet access?
- Email overload
- Don’t know if emails have been read

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**Events and roadshows**

**Why is it good?**
- Face-to-face interaction
- Encourages Q&A style communication
- Good for involving people
- Can be used to address issues quickly

**Things to consider**
- Can be time and resource intensive
- Ensure content meets audience needs
- Takes time to organise, not quick to cascade information

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**Your communications toolkit**

**Face-to-face**
- Roadshows
- Conferences
- Team meetings
- Cascade
- Breakfast with the CEO
- Workshops
- Focus groups
- Informal drop-ins
- Grapevine
- Gossip!

**Audio**
- CD
- Broadcast
- Podcast
- Audio conference
- Skype

**Online/Digital/Social Media**
- Website
- Email
- Intranet
- Screen savers
- Text message
- Video
- Apps
- Online forums
- Blogs
- Live Q&A
- Webinars
- Toolkits
- Plasma Screens

**Print**
- Posters
- Desk drops
- Launch packs
- Magazines
- Booklets
- Reports
- Toolkits
- Point of sale in communal areas
- Hanging signs
- Floor graphics
- Office divider graphics

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**Implementation ideas and comms tools**

**Mix it up**
## Using outside help

**Creative agencies**
Outside help from creative design agencies, research and experiential agencies can make a real difference. External agencies can help you to complete valuable tasks such as: research, facilitating employee focus groups, shaping thinking, branding, creative concepts, themes, design and graphics. They’ll bring your Vision & Values alive and make them memorable.

<table>
<thead>
<tr>
<th>What external help can bring to the table</th>
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<tbody>
<tr>
<td>➤ Interview staff, run focus groups, workshops, run online surveys where results can be analysed online, and provide a comprehensive set of recommendations and action points.</td>
</tr>
<tr>
<td>➤ The creativity, themes or designs to bring your Vision &amp; Values alive, make them memorable and have impact; fun ideas for implementation linked to the theme; work on wording to make it conversational and not too corporate.</td>
</tr>
<tr>
<td>➤ Assistance with implementation roll-out, producing all the communications you need and ensuring they’re in the right place at the right time. Can support you with logistics of getting media to different places.</td>
</tr>
<tr>
<td>➤ Work with you to create amazing events where the employees have an actual ‘experience’.</td>
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Using outside help

What are people’s views?

“Flair/creativity by agencies brings vision and values alive”

“Agencies make very good facilitators - use agencies to run workshops”

“Essential to help with rollout and implementation”

“Know your limitations – get help with: overall architecture of programme, launch, experiential, project management”

“Agencies bring fresh thinking and make it more memorable”

“Agencies are good to challenge your thinking – if you’re looking for new thinking and emphasis”

“We do use outside help. It’s vital to help us with different ways of thinking. It’s really important to us”

“We have used agency support for development of creative materials and supporting narrative development”

“The value of external support is capacity, new thinking and emphasis”

Using outside help

Planning a campaign - ten point plan

1. Leadership support
2. Get to know employees
3. What are you saying?
4. Plan your comms activity
5. Engage your managers
6. Strong creative theme
7. Getting the message out
8. Implement your plan
9. Feedback and evaluate
10. Celebrate and reward success
Get in touch

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